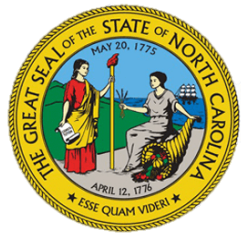


CVMS Provider Portal Log In and Getting Started User Guide

Version 3

January 15, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at
https://ncgov.servicenowservices.com/csm_vaccine

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021


3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Process Overview	4 - 5
Log In to CVMS Provider Portal	6 - 9
Provider Location Manager: Navigate CVMS Provider Portal	10 - 15
Healthcare Provider: Navigate Healthcare Provider Portal	16 - 18
Appendix	19 - 21

Log in and Getting Started with the CVMS Provider Portal

Overview



CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 15, 21, 01:58 AM	Test Scenario23 Dose 1 Scheduled	00111948	Clinic ABC Loc 1
Jan 15, 21, 02:03 AM	test dob Dose 1 Scheduled	00111950	Clinic ABC Loc 1
Jan 15, 21, 09:06 AM	Test Scenario17 Dose 1 Scheduled	00111956	Clinic ABC Loc 1

The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine.

This portal is different from the CVMS Provider Enrollment Portal, where Healthcare Providers enrolled for approval to administer the COVID-19 vaccine.

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Location Manager and Healthcare Provider** profiles.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, Edge Chromium browsers.

Now, let's get started!

Log In to the CVMS Provider Portal

How do I log in to the CVMS Provider Portal?

Step 1 of 3: Enter NCID and NCID Password

1. The link to the CVMS Provider Portal will open a NCID Log-In Screen
2. Enter your **NCID Username** and **NCID PASSWORD**
3. Click **NCID LOGIN**
4. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to the Appendix.

NCID Tips

NCID

Username

Password

NCID Login

[Forgot Username](#)

[Forgot Password](#)

[Unlock Account](#)

[Need Help?](#) [Register!](#)

[Privacy and Other Policies](#) [Contact Us](#)

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. NCC742

Tasks

Log into CVMS Provider Portal

Tips

Remember your NCID username and password.

Your NCID must be linked to your profile prior to your first log in. Contact your Organization Administrator for CVMS to request to be added to CVMS.

Audience

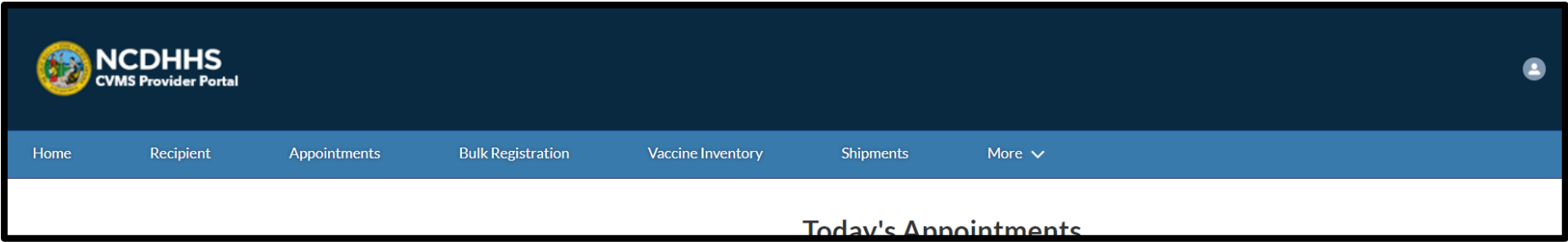
Healthcare
Provider

Healthcare
Location Manager

Step 2 of 3: View the CVMS Provider Portal Tabs

In the CVMS Provider Portal, **TABS** help you navigate between pages. The **TABS** you see are based on your user profile, Healthcare Location Manager or Healthcare Provider.

- 1. Healthcare Location Managers have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION, VACCINE INVENTORY, SHIPMENTS** and **HELP & INFORMATION**



- 2. Healthcare Providers have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS** and **HELP & INFORMATION**



Tasks

Explore the Homepage

Tips

Learn more about managing your recipient's appointments in the **CVMS Provider Portal Recipient Check-In User Guide**.

Audience

Healthcare Provider

Healthcare Location Manager

Step 3 of 3: View the CVMS Provider Portal Homepage

- 1. On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY’S APPOINTMENTS**.

Please note that the Date of Birth will be displayed as follows: Year – Month – Day.


Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD



Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER
------	---------	-------------

Audience

Healthcare
Provider

Healthcare
Location Manager

Healthcare Location Manager: Navigate the CVMS Provider Portal

How do I navigate the CVMS Provider Portal as a
Healthcare Location Manager?

Step 1 of 5: Recipient Tab Overview

Home

Recipient

Appointments

Bulk Registration

Vaccine Inventory

Shipments

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q Testdemo

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
Nicholas	TestDemo	Feb 24, 1989	Male	Not Approved	Phase 2 Group 3	Registered	

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

- 1. The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.
- 2. Click the **RECIPIENT’S NAME** to view their account.
- 3. Your search results will also include any records of a recipient who received a COVID-19 vaccine dose with their long-term care facility provided by a State of North Carolina pharmacy partner.

Tasks

View Recipient tab

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide**.

Audience

Healthcare
Location Manager

Step 2 of 5: Bulk Registration Tab Overview

Home

Recipient

Appointments

Bulk Registration

Vaccine Inventory

Shipments

More

Low Volume (100)

High Volume (5,000)

Employee Upload

If you're uploading 100 employees or less, upload file here.

Drag and Drop CSV file here

Total number of records: 10296

Search this list...

First Name

Last Name

Email

- 1. The **BULK REGISTRATION** tab allows you to upload a list of employees and generate their invitation to register in CVMS to receive a COVID-19 vaccine.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

Tasks

View Bulk Registration tab

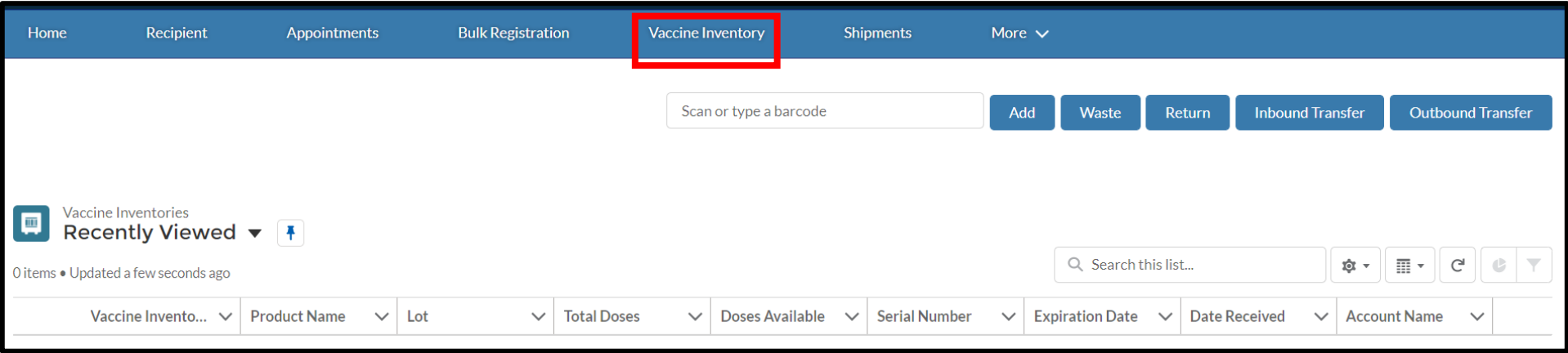
Tips




Learn more about uploading your staff information in the **CVMS Provider Portal Recipient Bulk Upload User Guide**.

Audience

Healthcare Location Manager

Step 3 of 5: Vaccine Inventory Tab Overview



- 1. The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory
- 2. To pin a list view, click . The pinned list view will then load as the default list view.
- 3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record  (alphanumerically) or its last  (Down Sort icon).
- 4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

Tasks

View Vaccine Inventory tab

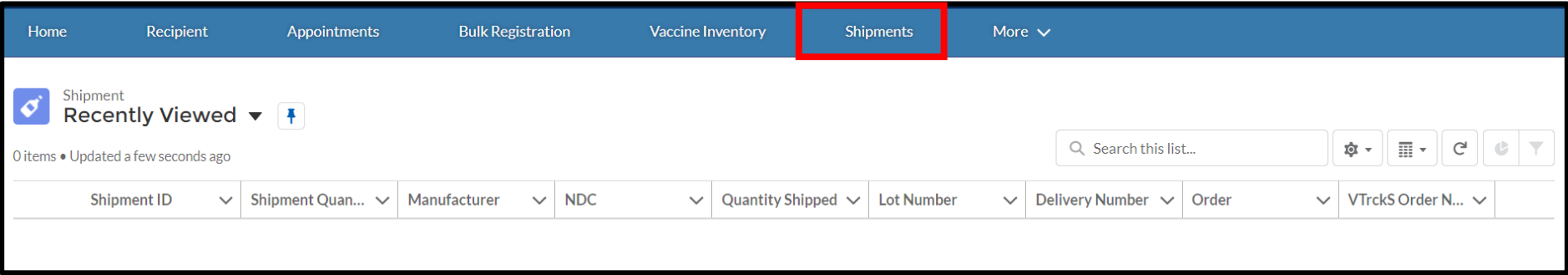
Tips




Learn more about administering your COVID-19 vaccine inventory in the **CVMS Provider Portal Vaccine Inventory Wastage, Returns & Transfers User Guide**.

Audience

Healthcare
Location Manager

Step 4 of 5: Shipments Tab Overview



- 1. The **SHIPMENTS** tab allows you to see your location’s COVID-19 vaccine shipment information
- 2. To pin a list view, click  . The pinned list view will then load as the default list view.
- 3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column’s first record  (alphanumerically) or its last  (Down Sort icon).
- 4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available you have the Healthcare Location Manager profile.

Tasks

View Shipments tab

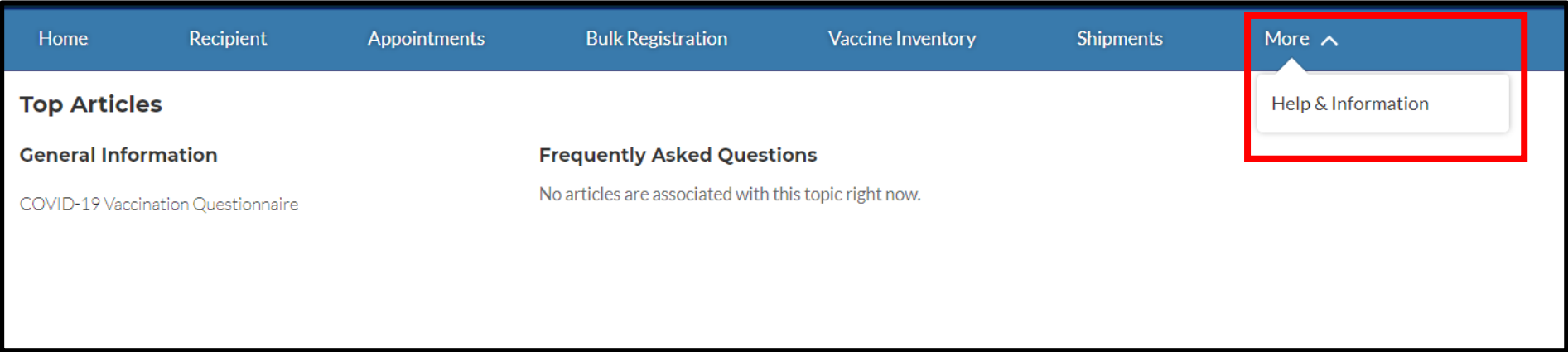
Tips

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving & Processing Vaccine Inventory Shipments User Guide**.

Audience

Healthcare
Location Manager

Step 5 of 5: Help and Information Tab Overview



- 1. The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccination (Health) Questionnaire.

Tasks

View Help & Information tab

Tips

Learn more about finding support in the **CVMS Provider Portal Accessing Help Resources User Guide**.

Audience

Healthcare
Location Manager

Healthcare Provider: Navigate the CVMS Provider Portal

How do I navigate the CVMS Provider Portal as a
Healthcare Provider?

Step 1 of 2: Recipient Tab Overview

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q TestDemo

Optional Date of Birth

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose...	Email
Nicholas	TestDemo	Feb 24, 1989	Male	Not Approved	Phase 2 Group 3	Registered	

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

- 1. The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.
- 2. Click the **RECIPIENT’S NAME** to view their account.
- 3. Your search results will also include any records of a recipient who received a COVID-19 vaccine dose with their long-term care facility provided by a State of North Carolina pharmacy partner.

Tasks

View Recipient tab

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Check-In User Guide**.

Audience

Healthcare Provider

Step 2 of 2: Help and Information Tab Overview

Home

Recipient

Appointments

Help & Information

Top Articles

General Information

COVID-19 Vaccination Questionnaire

Frequently Asked Questions

No articles are associated with this topic right now.

1. Within the **HELP & INFORMATION** tab, you can see Frequently Asked Questions about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccination (Health) Questionnaire.

Tasks

View Help & Information tab

Tips

Learn more about finding support in the **CVMS Provider Portal Help Resources User Guide**.






Audience

Healthcare
Provider

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

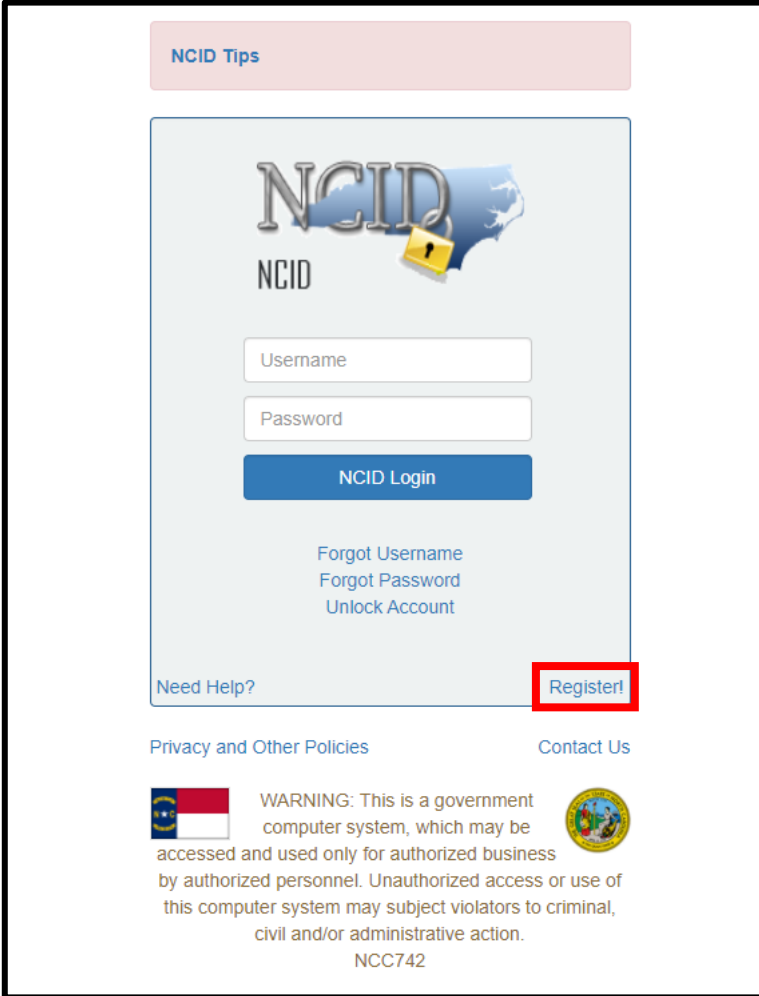
Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium to access CVMS.
- For more details on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

How to Obtain an NCID

Instructions for a user to create an NCID:

- Navigate to <https://ncid.nc.gov/>
- Click **Register!** (in the bottom right corner of the blue box)
- Click **Business** user type option
- Complete the required fields to create an NCID
- Follow the steps to access your NCID account **and** create your security questions
- Once created, you will need to provide your NCID username to the designated Vaccine Coordinator for your location so they can request access to CVMS for you.
- Once access has been granted by NC DHHS, the Vaccine Coordinator for your location should notify you that you are able to log in to the CVMS Provider Portal.
- If you have any questions **or need assistance in identifying the Vaccine Coordinator for your location**, please submit all inquiries to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.



The screenshot shows the NCID (North Carolina Immunization Data) web portal. At the top, there is a pink box labeled "NCID Tips". Below it is a blue box containing the NCID logo (a map of North Carolina with a padlock) and the text "NCID". Under the logo are two input fields for "Username" and "Password", followed by a blue "NCID Login" button. Below the login button are links for "Forgot Username", "Forgot Password", and "Unlock Account". At the bottom of the blue box, there is a "Need Help?" link on the left and a "Register!" link on the right, which is highlighted with a red rectangle. Below the blue box, there are links for "Privacy and Other Policies" and "Contact Us". At the bottom of the page, there is a warning message: "WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. NCC742". To the left of the warning is a small American flag icon, and to the right is the North Carolina state seal.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	<ul style="list-style-type: none">• Uploaded the first version of the PPT	ALL	Training Team
2	1/10/2021	<ul style="list-style-type: none">• Removed any mention of the 2 CVMS Help Desk emails• Added Service Now Portal information• Screenshot of new bulk upload added	1, 2, 12, 20, 21	Courtney Seward
3	1/15/2021	<ul style="list-style-type: none">• Updated navigation bars for both CVMS Provider Profiles• Updated Recipient Tab search feature	11, 17	Azalea Troche